



Version 5.2.1

Bright Pattern Documentation

Generated: 8/08/2022 11:09 pm

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General Settings

Case & Contact Management settings allow you to make system-wide changes to how cases and contacts are treated in Agent Desktop. Currently, the General Settings section includes the following setting. Note that the settings shown here apply only to Case & Contact Management, and they differ from the general settings shown in [Call Center Configuration](#).

Automatically mark all cases for follow-up for the creating user

Selecting this checkbox allows cases created from an active call or chat to be automatically pinned to the creating agent. Automatically pinning interactions helps agents to keep better track of work by preventing important chats and calls from getting lost.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to this property, we recommend that all affected logged-in agents refresh their browser page.

Display contacts and cases for default search results

If this checkbox is checked, when an agent uses the search bar in *My Cases*, the results display the first 200 cases/contacts, newest first (sorted by creation date/time in descending order). If it is unchecked, no search information is displayed; the agent will see "Enter search criteria" in the middle of the table, instead. The default setting is checked.